



REALTOR® Technology Survey Report 2012

The NATIONAL ASSOCIATION OF REALTORS® is the world's largest trade association, representing over 1 million members.

The term REALTOR® is a registered collective membership mark that identifies a real estate professional who is a member of the NATIONAL ASSOCIATION OF REALTORS® (NAR) and subscribes to its strict Code of Ethics.

For more information about NAR, visit www.REALTOR.org.

The Center for REALTOR® Technology is a department within NAR. Its purpose is to serve the REALTOR® membership as an industry advocate, an implementation consultant, and a technology resource. One of the major surveys carried out by CRT is the *REALTOR® Technology Survey*. It is conducted annually among a random sample of REALTORS® who have provided a valid email address.

This report summarizes national findings collected in January 2013 among sales agents, associate brokers, brokers, broker-owners, and managers regarding REALTOR® practices in 2012. These groups account for 1,139 completed surveys. (82 respondents listed “other” roles in real estate; these were screened out of the survey.) This number is large enough for overall responses to be statistically valid and reflective of the general population of REALTORS® to a margin of error of +/-2.9% at a 95% level of confidence. Respondents were asked to look back 12 months (into 2012) and tell us about their real estate business experiences with technology.

The purpose of this survey report is to provide a broad picture of REALTORS®’ technology characteristics and needs. Key topics covered are:

- Respondent Profile
- Technology in General
- Broker-Provided Technology
- MLS-Provided Technology
- Mobile Use in Business
- Technology and REALTOR® Associations
- Social Media & Networking
- Lead Generation & Listings
- Real Estate Websites

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Report Highlights

- REALTORS® tend to find the most value in technology tools that allow them to conduct business quickly and conveniently, wherever they need to. Forms software, mobile apps, electronic tablets, property databases and CRM solutions topped the list of most valuable tools this year.
- While Apple iPads are still the technology tool REALTORS® most often plan to purchase in the next 12 months, one-third do not plan to purchase any of the listed tools. However, REALTORS® still report spending more on technology for their businesses in 2012 than in 2010. Given the list of most valuable tools, this money may have been spent on software, databases and CRM solutions as opposed to new devices.
- REALTORS® spend a median 44% of their time corresponding with and doing work for their clients on mobile devices. 94% communicate with clients using a mobile device.
- Almost half of REALTORS® now use Apple iPhones. iPhone use among REALTORS® has almost doubled since 2011, jumping from 28% to 45%. Android use has held steady at 37%, while Blackberry use has dropped from 18% to 5%. Virtually all REALTORS® (92%) now use smartphones of some kind in their businesses.

Report Highlights (Continued)

- Agents and associate brokers find more value in the technology supplied by their MLSs than in that provided by their brokers, and are more interested in their MLSs expanding the technology services offered than in expanded broker-provided technology.
- REALTORS® are most likely to access their state and local association websites using desktop computers rather than smartphones or tablets.
- 89% of all REALTORS® use social media, and 80% use it for their real estate business. However, brokers appear to be less comfortable with social media than in 2011, and are more likely than agents and associate brokers to say they do not use it for their businesses.
- Referrals, repeat business and the Internet remain the top three most important methods of generating leads. The Internet, however, is rated significantly* less important as a lead-generating method than in 2011.
- REALTOR.com® remains the web site where REALTORS® most often display their listings.

Respondent Profile

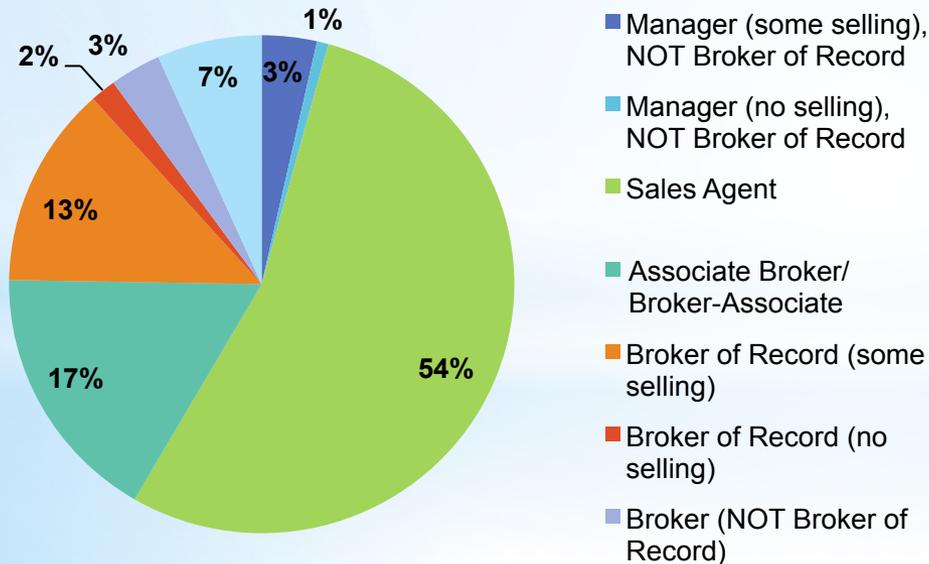
Current Role

54% of survey respondents describe their current role as sales agents. This is slightly down from 60% in 2011.

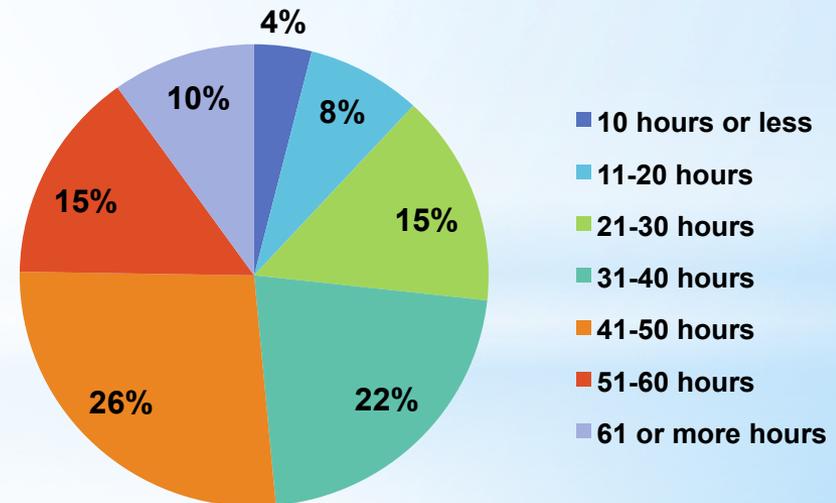
Full- or part-time?

REALTORS® work a median of 41 hours per week in real estate. As in 2011, 52% indicate that they work over 40 hours per week.

Which of the following best describes your current role?



How many hours per week do you typically work?



Respondent Profile

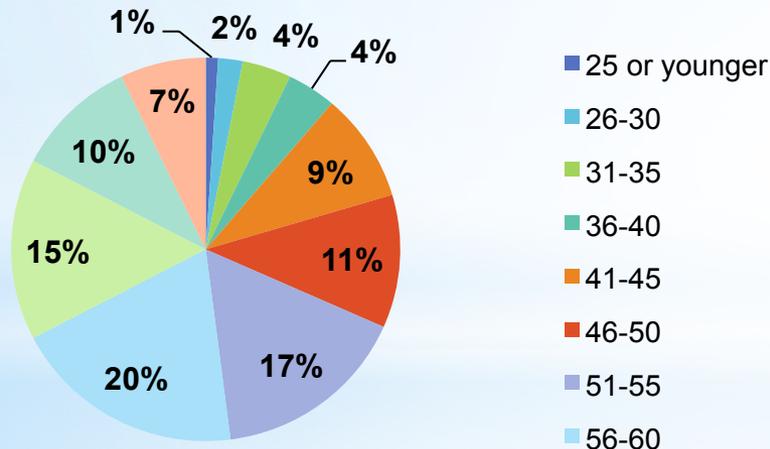
Age

The median age of respondents is 57 years old. 11% are 40 years old or under; 89% are over 40 years old. These respondents are considerably older than those in 2011, when the median reported age was 47 (42% reported being 40 or under).* However, it should be noted that this age is much closer to the median age reported in the 2012 NAR Member Profile (56 years).

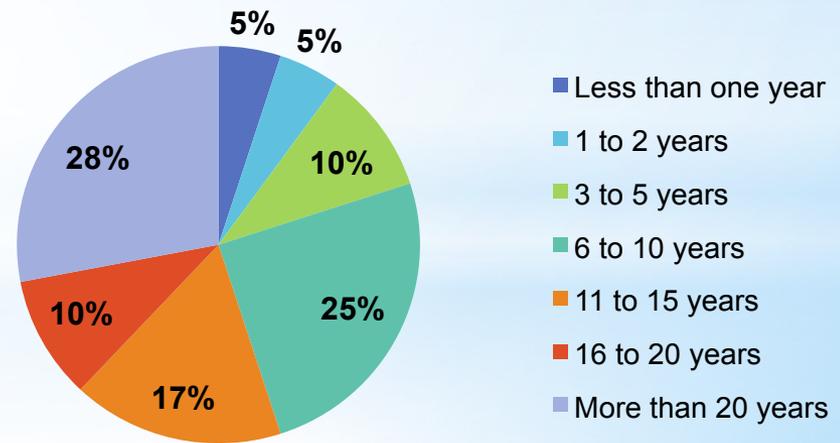
Years in Real Estate

The median number of years in real estate for REALTORS® is 13. Over half (55%) have been in the business over 10 years. 20% joined the real estate business in the past 5 years; this is down significantly from 36% in 2011.*

Which of the following best represents your age?



How long have you been in the real estate business (in any capacity)?



*In 2011, the survey was both sent to a random sample of REALTORS® and posted on social media sites and at realtor.org; the 2012 was sent only to a random sample of REALTORS® overall. This difference may account for the shift here in age and experience level.

Respondent Profile

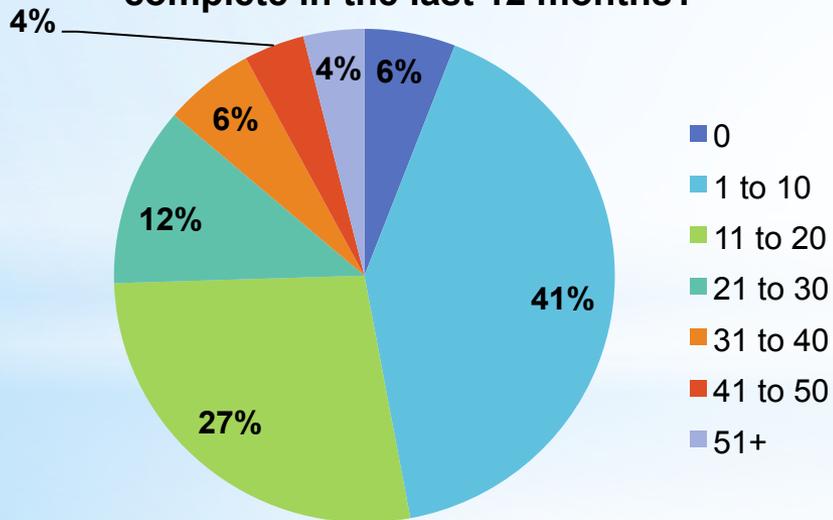
Transactions Completed

REALTORS® completed a median of 12 transaction sides in the last 12 months. 48% completed 10 or fewer. This is similar to 2011, when 42% reported 9 or fewer.

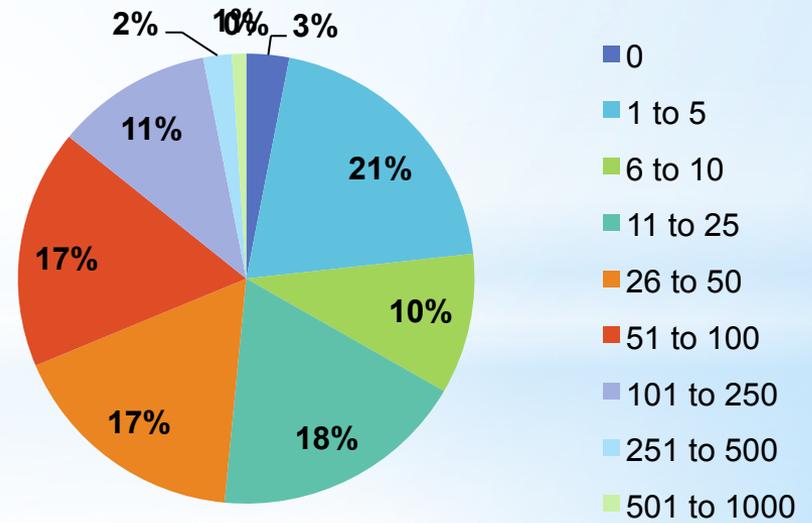
Number of Agents in the Office

30% belong to an office with 1-10 agents (essentially unchanged from 28% in 2011). 51% are in offices with 24 or fewer.

How many transaction sides did you complete in the last 12 months?



How many agents are in your office?



Respondent Profile

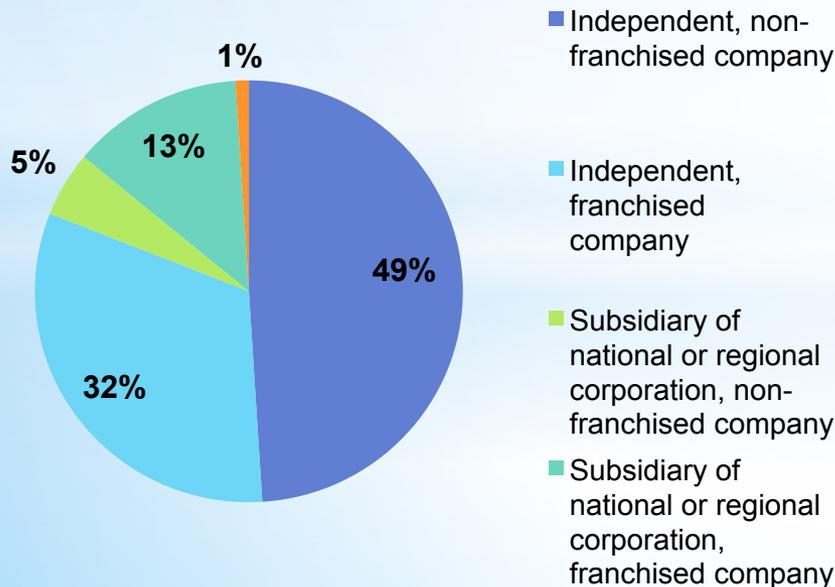
Firm Type

49% work at a firm described as an “independent, non-franchised company.” This is unchanged from 2011.

State

The largest proportions of REALTORS® do business primarily in California (12%), Florida (8%), and Texas (5%).

Which of the following best describes the firm where you work?

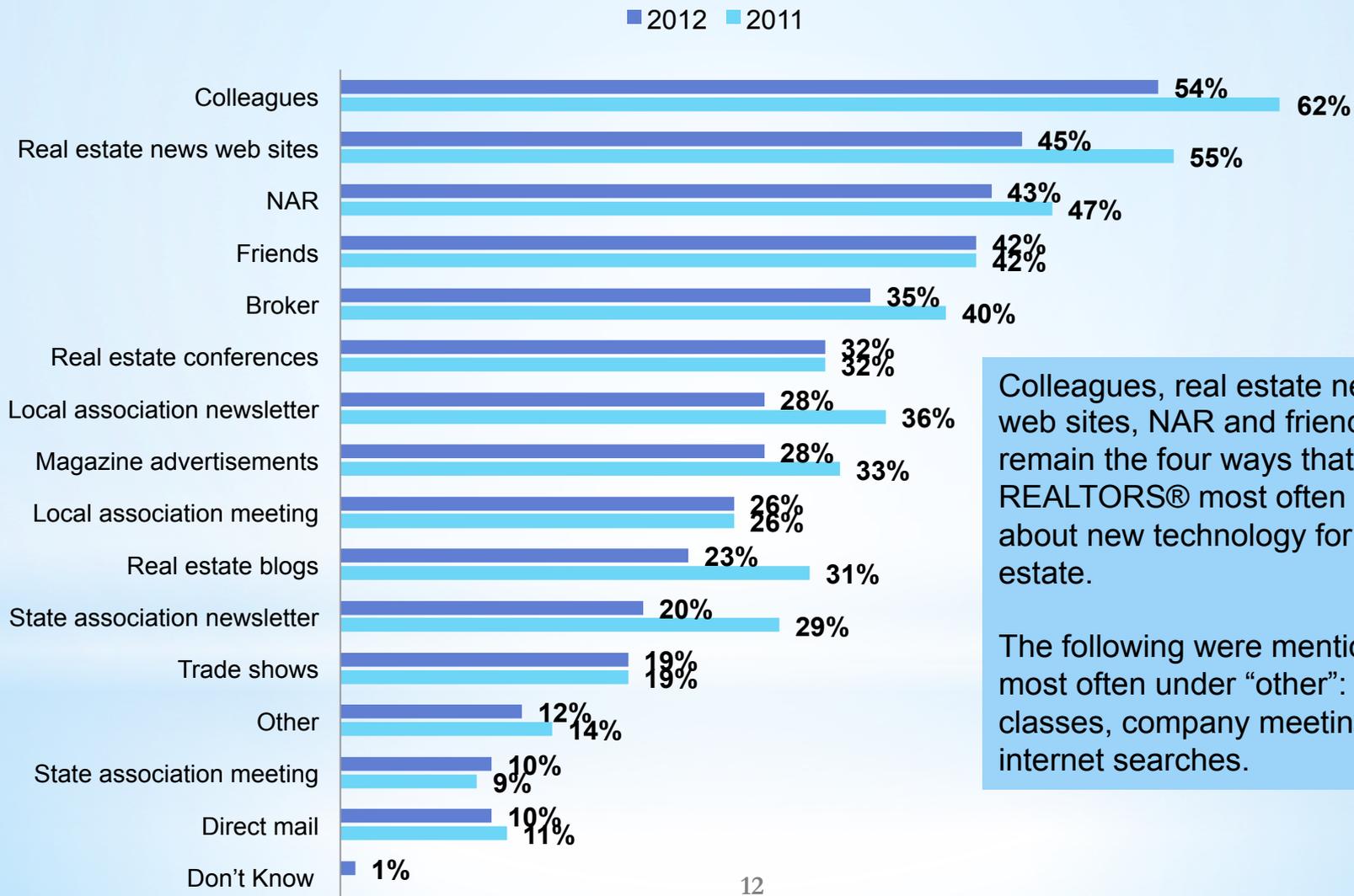


State	% of All Responses	State	% of All Responses
Alabama	1%	Montana	1%
Alaska	0%	Nebraska	1%
Arizona	5%	Nevada	1%
Arkansas	0%	New Hampshire	1%
California	12%	New Jersey	4%
Colorado	3%	New Mexico	1%
Connecticut	2%	New York	3%
Delaware	0%	North Carolina	2%
DC	0%	North Dakota	0%
Florida	8%	Ohio	3%
Georgia	3%	Oklahoma	1%
Guam	0%	Oregon	1%
Hawaii	1%	Pennsylvania	4%
Idaho	1%	Puerto Rico	0%
Illinois	4%	Rhode Island	0%
Indiana	2%	South Carolina	1%
Iowa	1%	South Dakota	0%
Kansas	1%	Tennessee	2%
Kentucky	1%	Texas	5%
Louisiana	1%	Utah	1%
Maine	0%	Vermont	0%
Maryland	2%	Virginia	4%
Massachusetts	2%	Virgin Islands	0%
Michigan	2%	Washington	3%
Minnesota	2%	West Virginia	0%
Mississippi	1%	Wisconsin	1%
Missouri	2%	Wyoming	0%

Technology in General

Technology in General

Where do you learn about technology for real estate?



Colleagues, real estate news web sites, NAR and friends remain the four ways that REALTORS® most often learn about new technology for real estate.

The following were mentioned most often under “other”: classes, company meetings, and internet searches.

Technology in General

Respondents were asked to list the three most valuable technology tools that they used in the last year (excluding email and cell phone). The most common responses were:

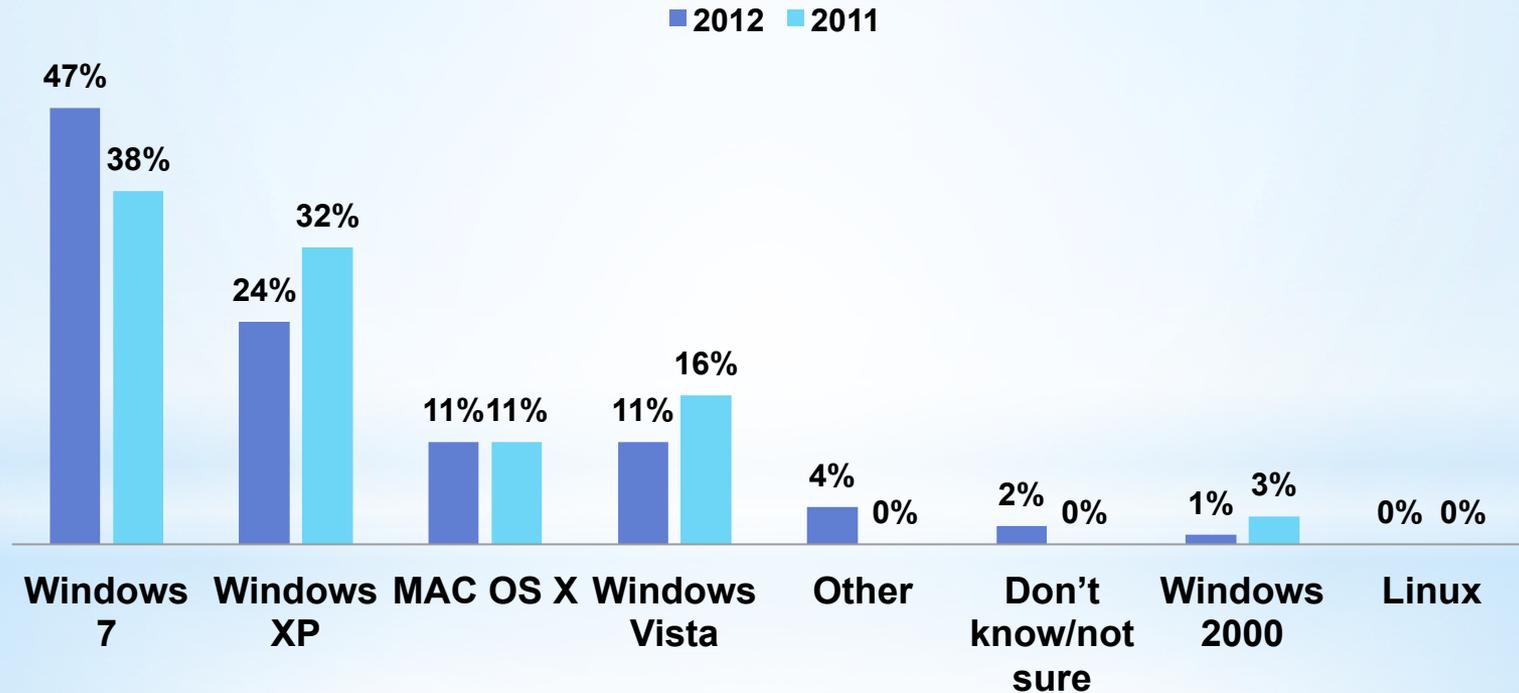
- Real Estate software for forms and contracts such as DocuSign, ZipForms, DotLoop, and FormSimplicity;
- Software and desktop tools such as Visual Tour, Adobe Acrobat, and AppFolio (property management software - new this year);
- Mobile apps such as Dropbox, e-Key apps, Evernote (new this year), Google Maps;
- Electronic tablets (iPad, Kurio);
- Databases and property listing sites such as local MLSs, Realist (public records database), Trulia, Zillow and REALTOR.com®;
- CRM solutions like Top Producer and e-Edge (Keller Williams);
- Social media sites like Facebook and Twitter.

REALTORS® tended to emphasize tools that allow them to conduct business smoothly and conveniently, wherever they need to. They also value tools that make them look technologically savvy to their clients.

Technology in General

83% of REALTORS® use Windows operating systems, down slightly from 89% in 2011. Use of Windows 7 has increased, while use of all other Windows programs is down. Use of MAC OS X has held steady at 11%.

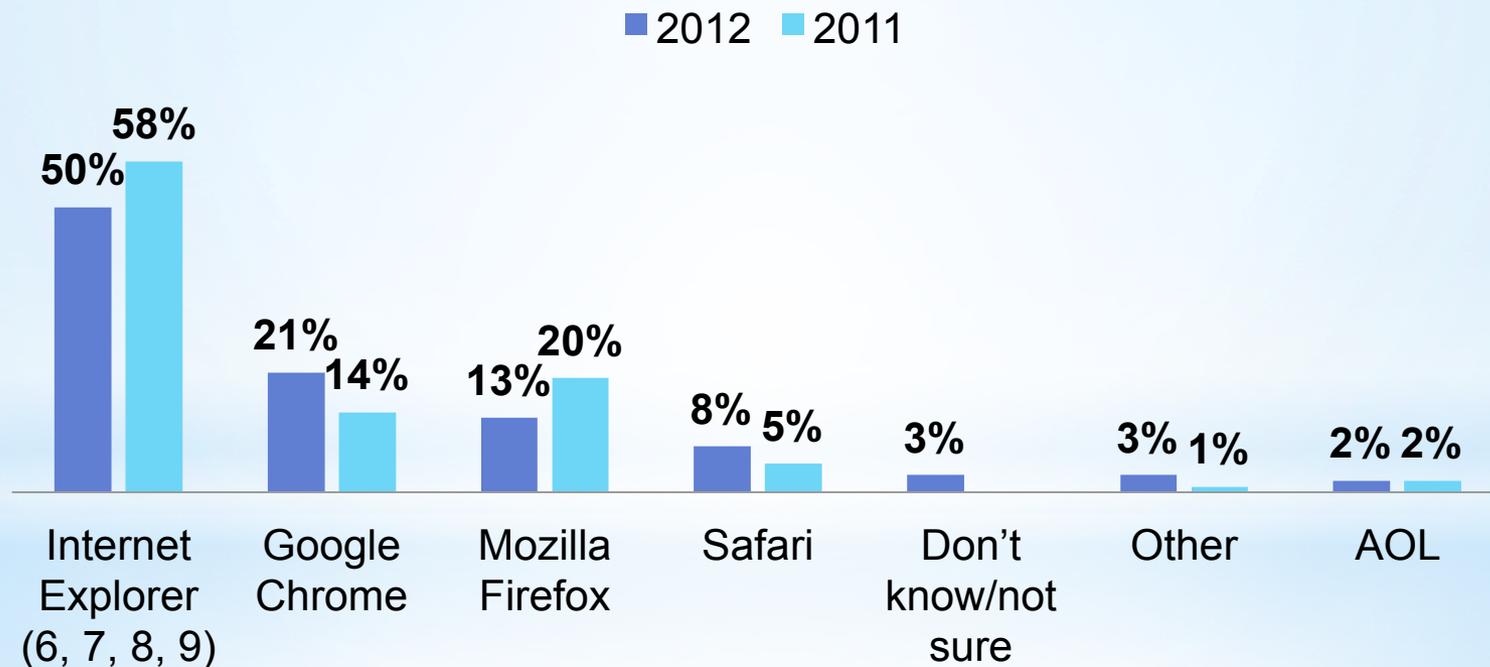
What operating system do you primarily use?



Technology in General

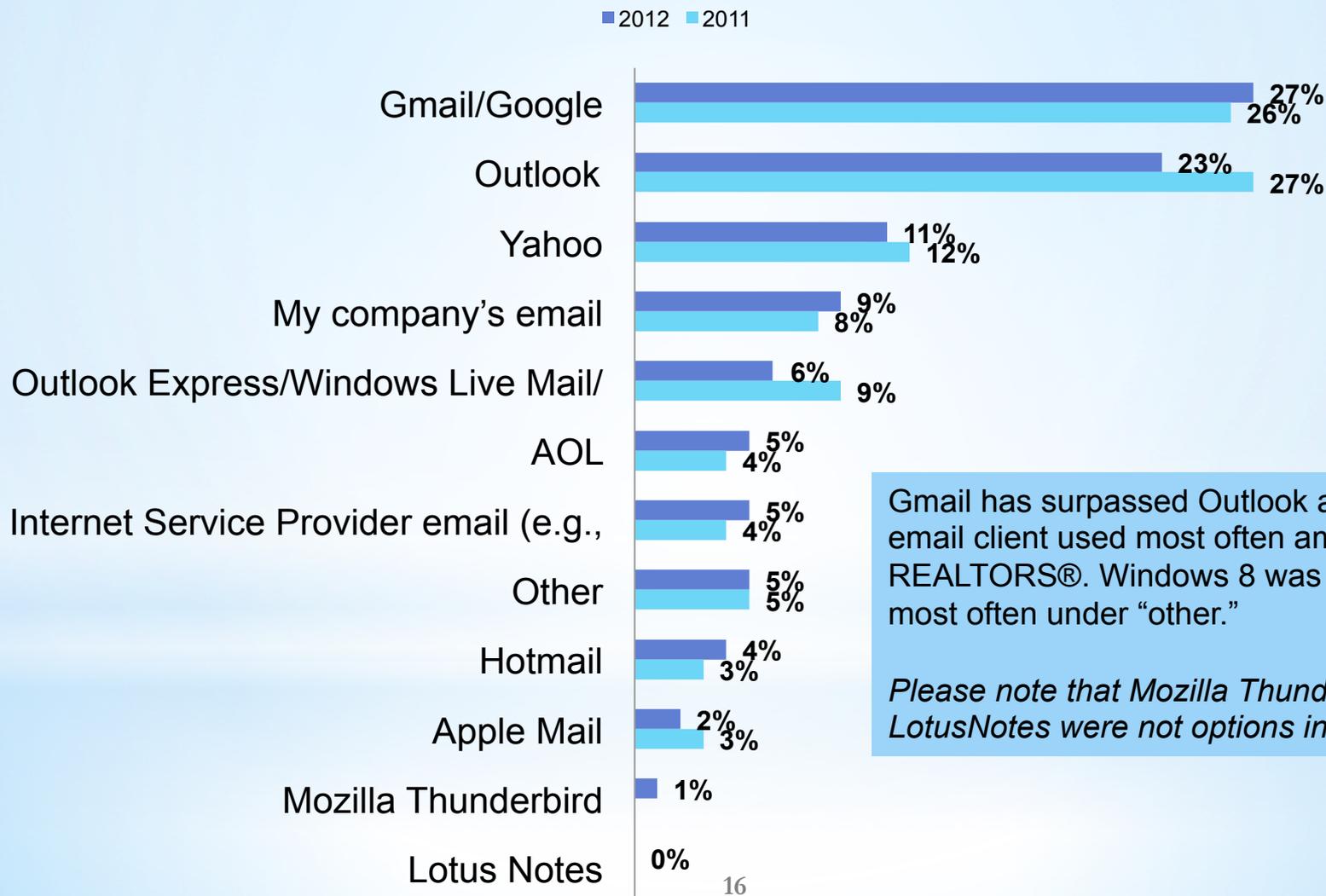
While use of Internet Explorer is down 8% from 2011, it is still the most commonly used web browser. However, Google Chrome use has increased by 50% since 2011, while Mozilla Firefox use has decreased by the same amount. (Virtually all of the “other” browsers mentioned were actually options in the survey.)

Which is your primary web browser?



Technology in General

What is your primary desktop email client?



Gmail has surpassed Outlook as the email client used most often among REALTORS®. Windows 8 was specified most often under “other.”

Please note that Mozilla Thunderbird and LotusNotes were not options in 2011.

Technology in General

Which of the following do you plan on purchasing or replacing in the next 12 months?



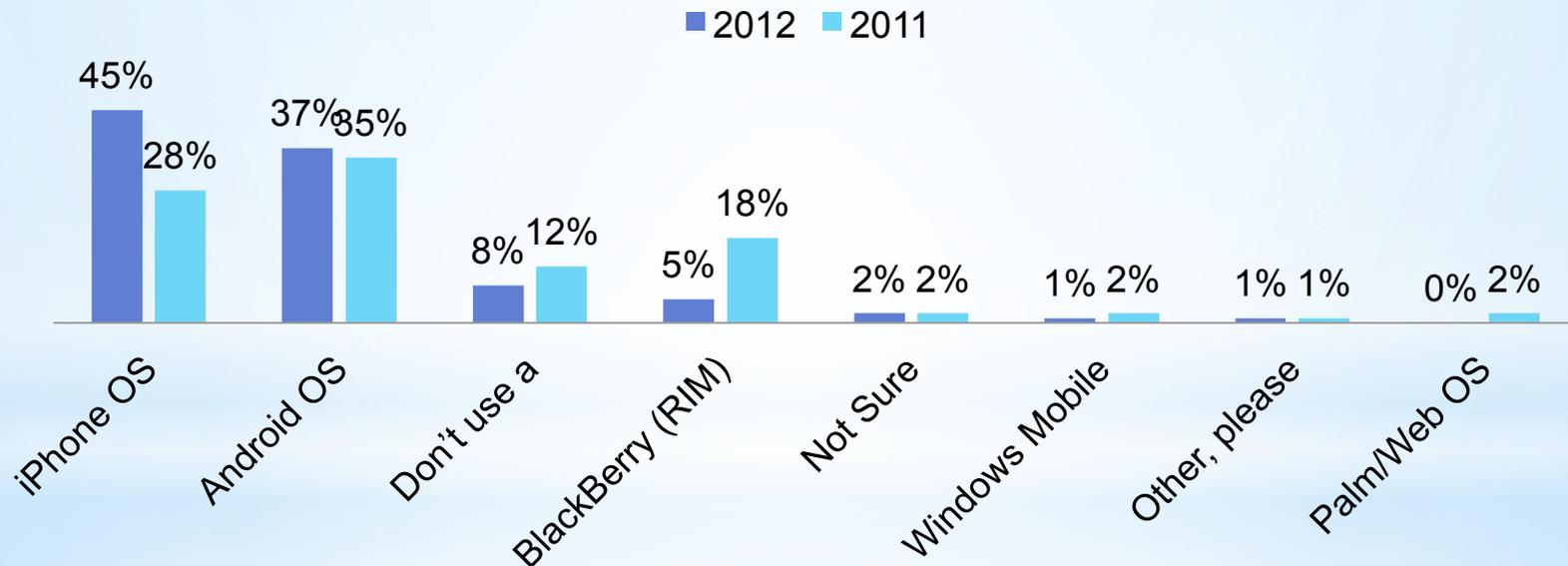
As in 2011, one-third of REALTORS® plan to purchase a tablet (iPad, Android, Surface, or Amazon Kindle). However, REALTORS® are twice as likely in 2012 than in 2011 to say they don't plan to buy any new technology in the next 12 months.

Mentioned most often under "other" was, "I already have most of these."

Technology in General

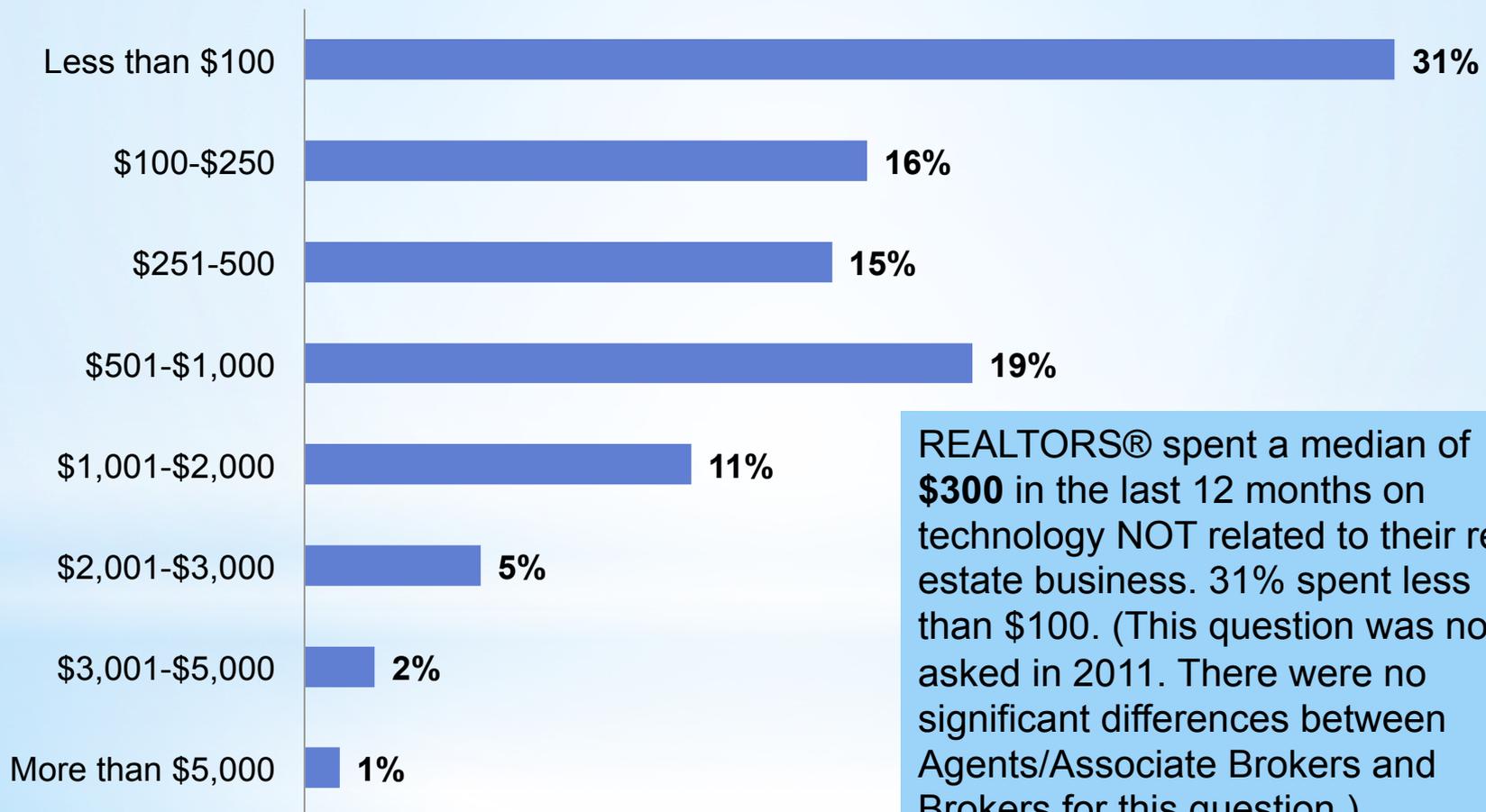
Use of iPhones among REALTORS® has almost doubled in the past two years, jumping from 28% to 45%. Android use has held steady at 37%, and Blackberry use has dropped from 18% to 5%. Smartphone use in general is up from 78% to 92%; virtually all REALTORS® now use smartphones in their business. Most of the few “other” comments were “don’t have a smartphone.”

What operating system (OS) does your business smartphone run?



Technology in General

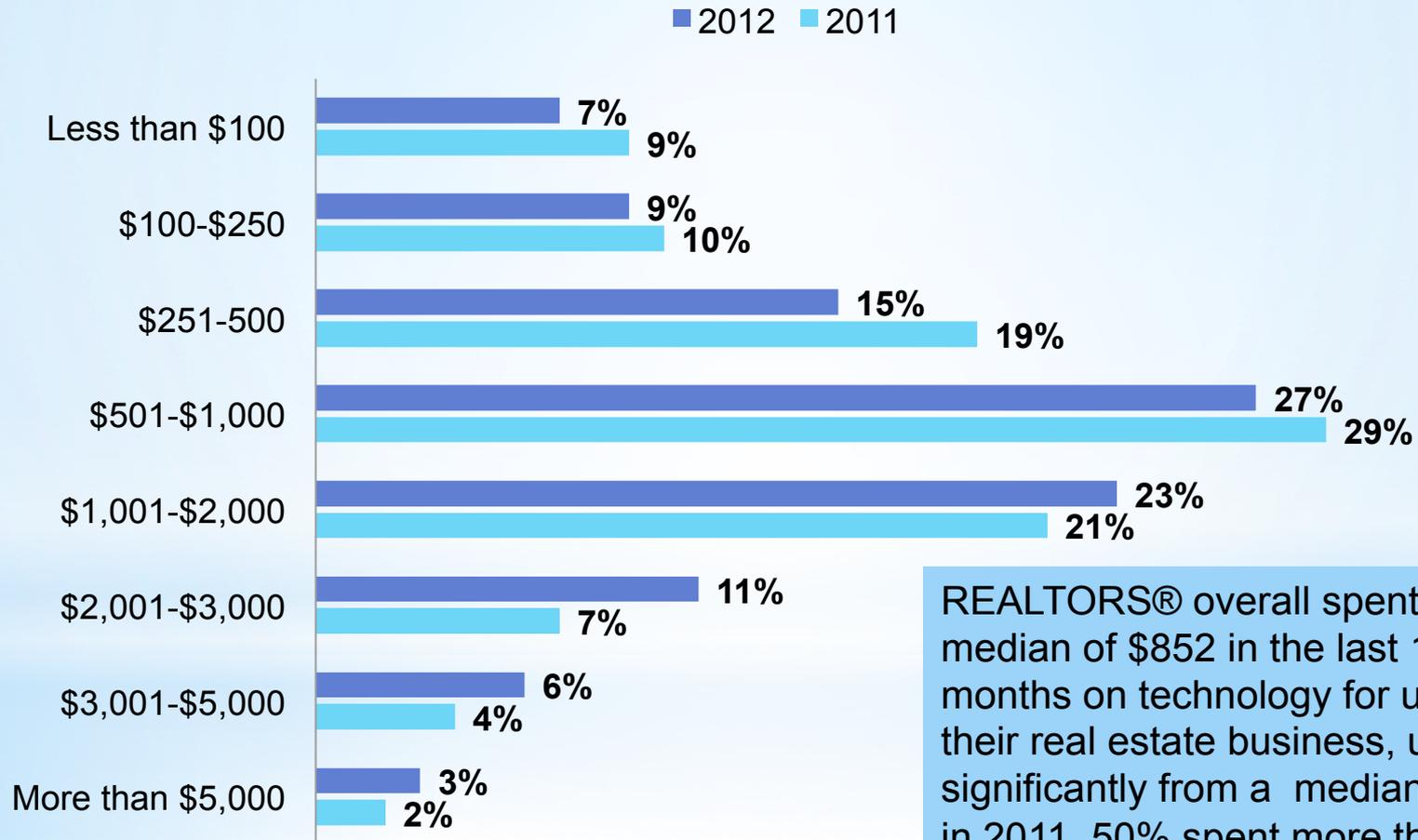
How much did you spend on technology NOT related to your business in the last 12 months?



REALTORS® spent a median of **\$300** in the last 12 months on technology NOT related to their real estate business. 31% spent less than \$100. (This question was not asked in 2011. There were no significant differences between Agents/Associate Brokers and Brokers for this question.)

Technology in General

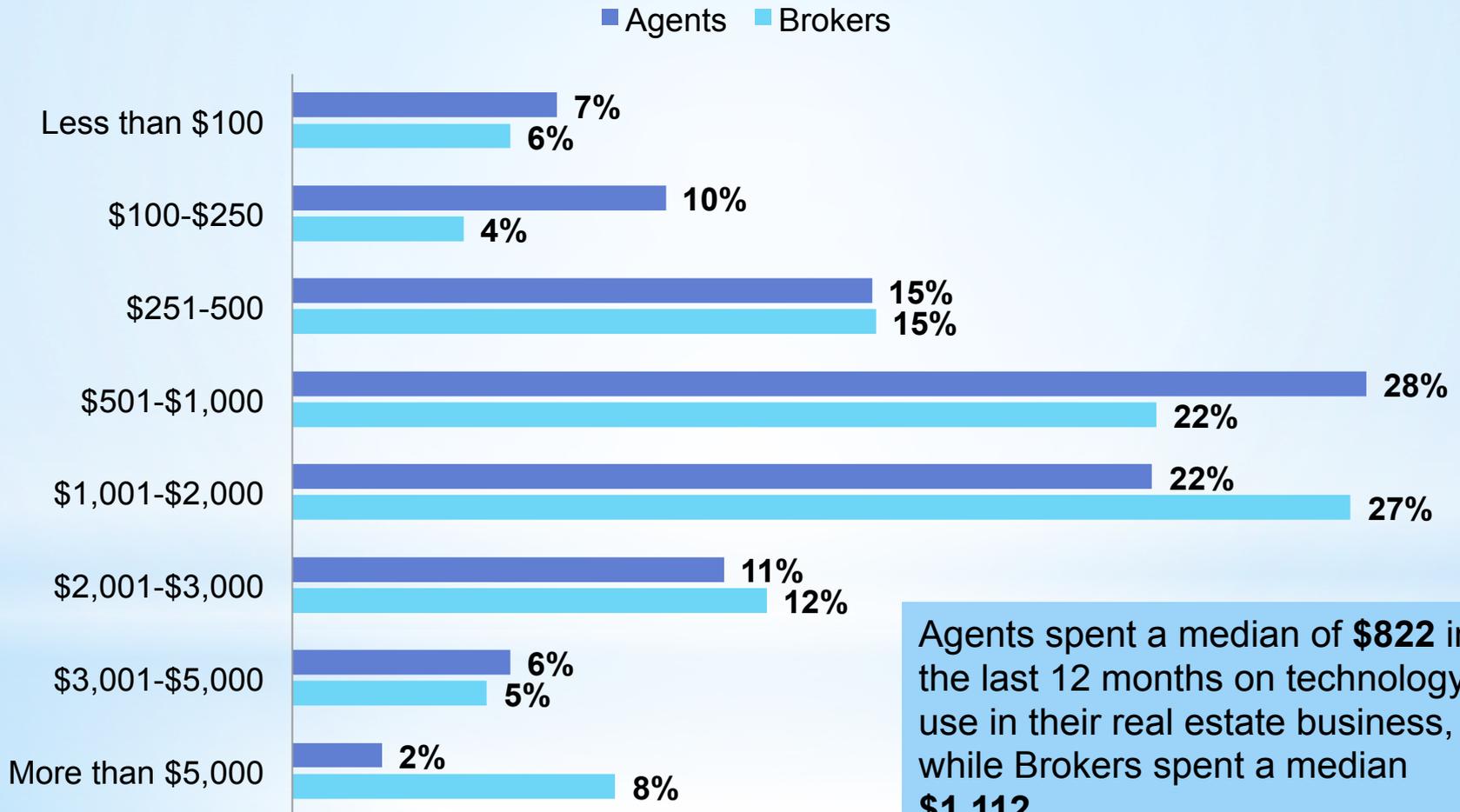
For use in your real estate business, how much did you spend on technology in the last 12 months?



REALTORS® overall spent a median of \$852 in the last 12 months on technology for use in their real estate business, up significantly from a median of \$707 in 2011. 50% spent more than \$500 but less than \$2,000.

Technology in General

For use in your real estate business, how much did you spend on technology in the last 12 months? Agents vs. Brokers



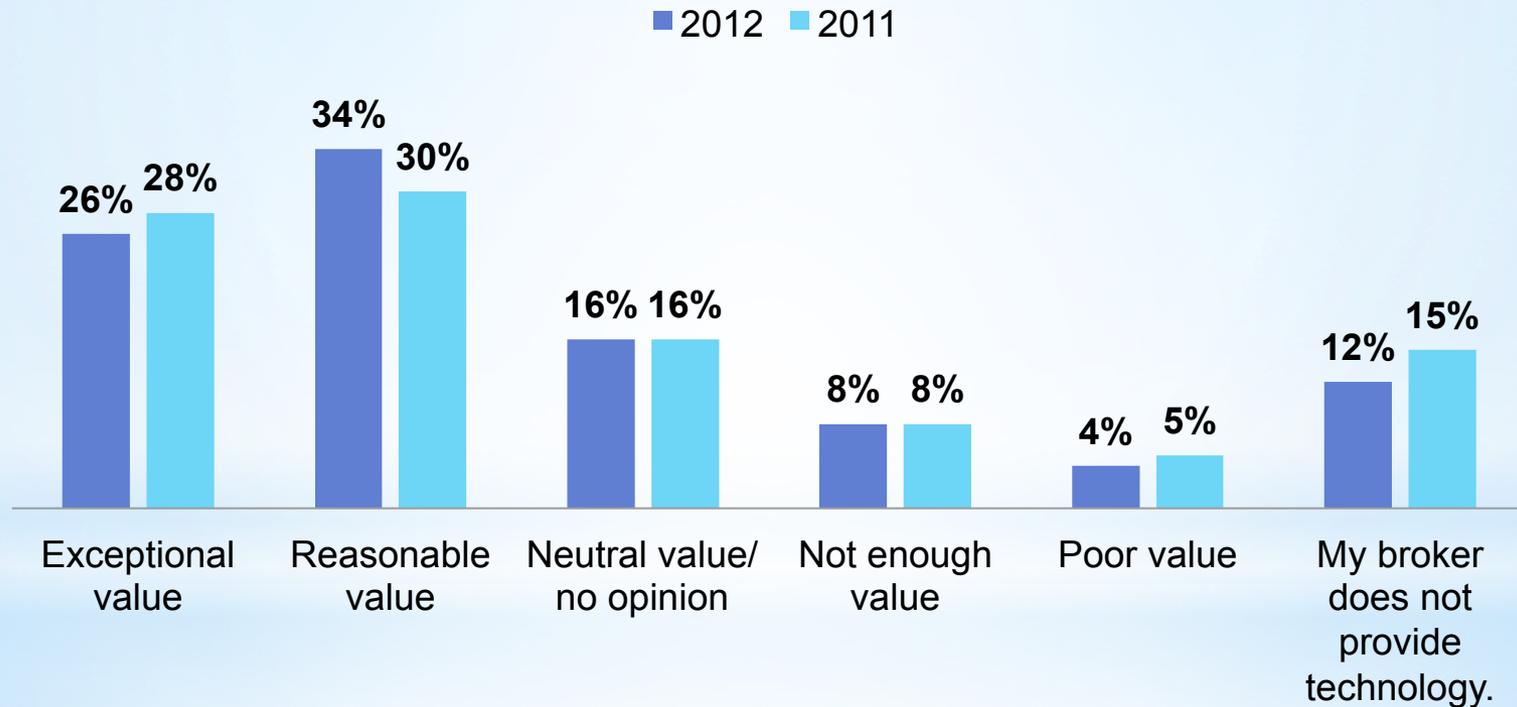
Agents spent a median of **\$822** in the last 12 months on technology for use in their real estate business, while Brokers spent a median **\$1,112**.

Broker-Provided Technology

Broker-Provided Technology

60% of Agents and Broker-Associates find reasonable or exceptional value in the technology supplied by their brokers. This is essentially unchanged from 2011.

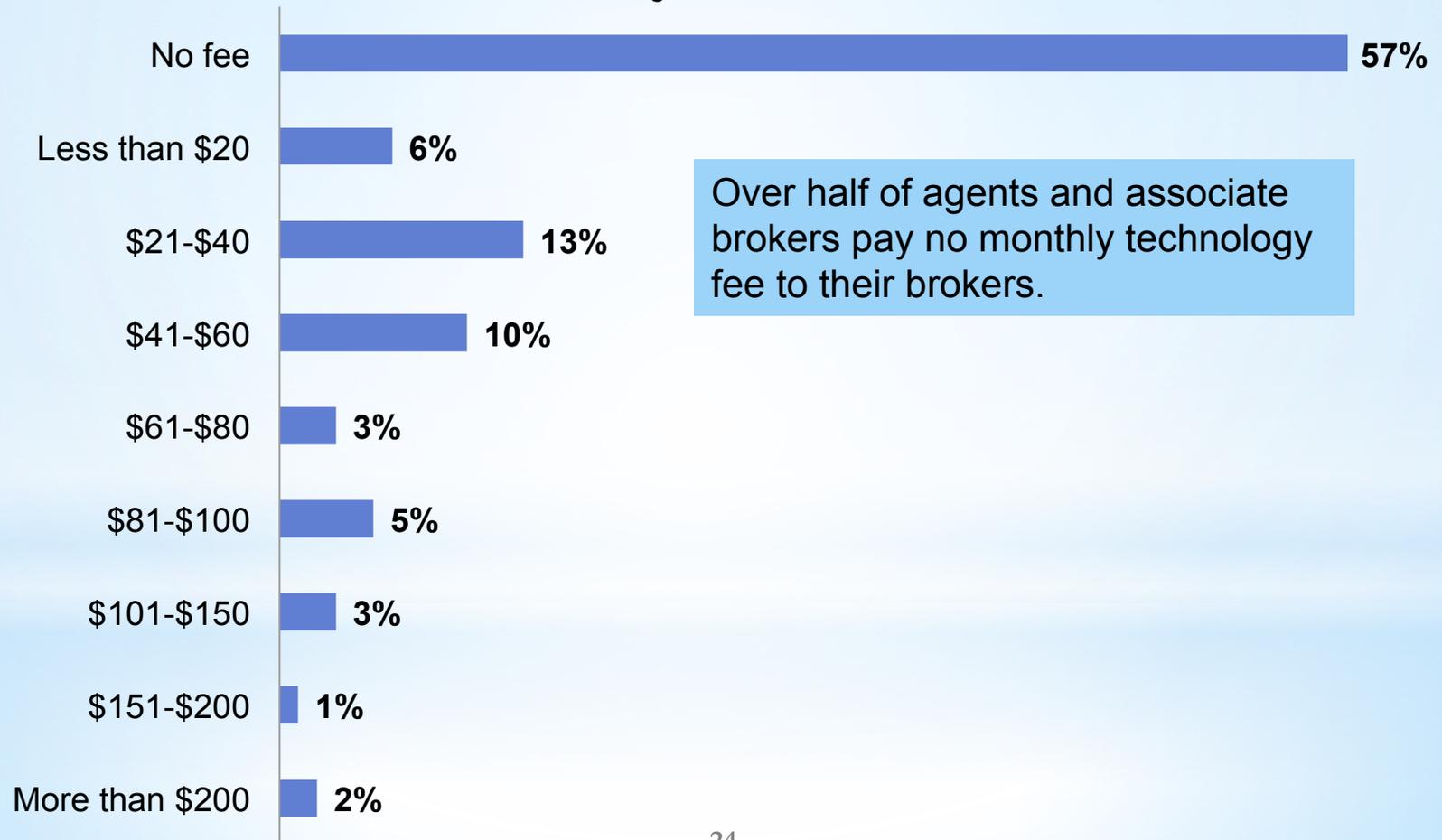
How valuable is the technology supplied by your broker?



Broker-Provided Technology

What is the monthly technology fee paid to your broker?

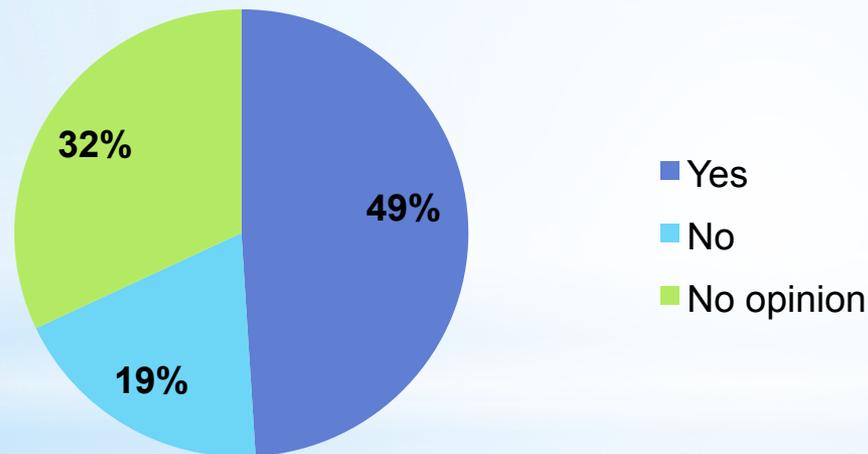
Question asked of Agents and Broker-Associates



Broker-Provided Technology

About half (49%) of Agents and Broker-Associates would like their broker to expand the amount of technology they offer them.

Do you want your broker to expand the amount of technology they offer you?



Question asked of Agents and Broker-Associates

These REALTORS® were asked what they expect from their brokers' technology offerings.

Cited most often were:

- a good CRM database
- a more professional website
- technology that allows access to all tools at once
- Cutting-edge technology
- Keeping agents up to date on technology trends
- More technology support/training

MLS-Provided Technology

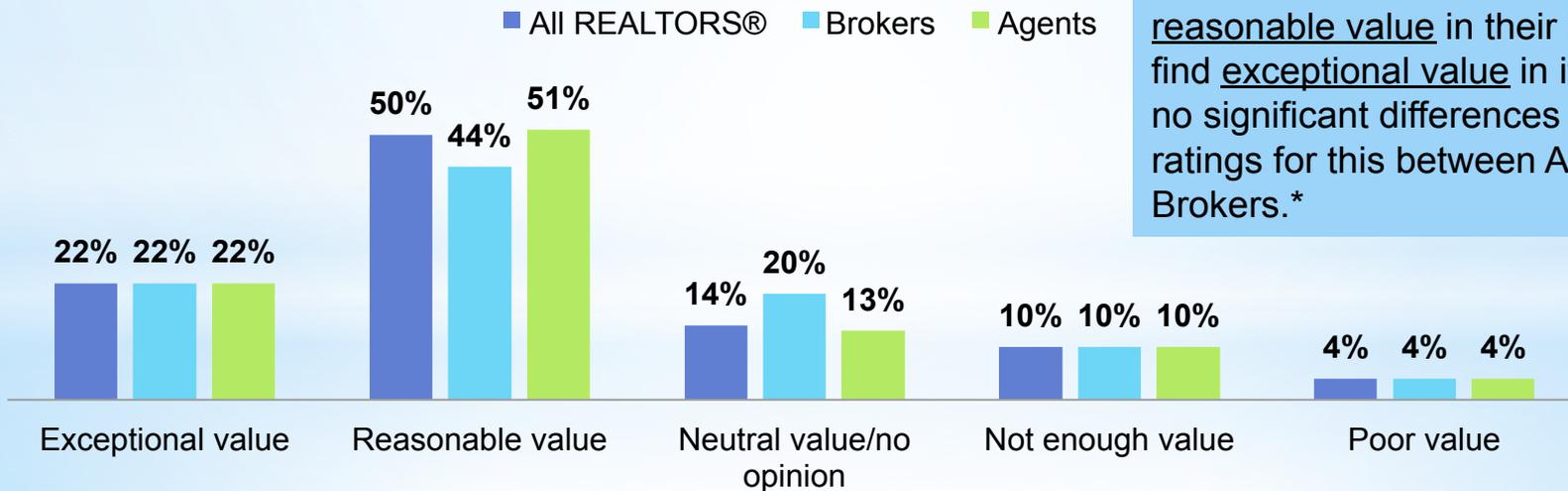
MLS-Provided Technology

The most valuable tools provided by MLSs cited most often are: Comps/CMA, auto-emails to clients/auto-prospecting, education, public records, property history information, IMAPP, Realist, RPR, statistics, and tax information.

65% of REALTORS® would like their MLS to expand the technology and services offered.

Suggestions for improvement include: better accessibility/better mobile capabilities; better mobile apps; improved CMA software; more ease of use.

How would you rate the value of your MLS system for the price you pay?



50% of all REALTORS® find reasonable value in their MLS; 22% find exceptional value in it. There are no significant differences in the ratings for this between Agents and Brokers.*

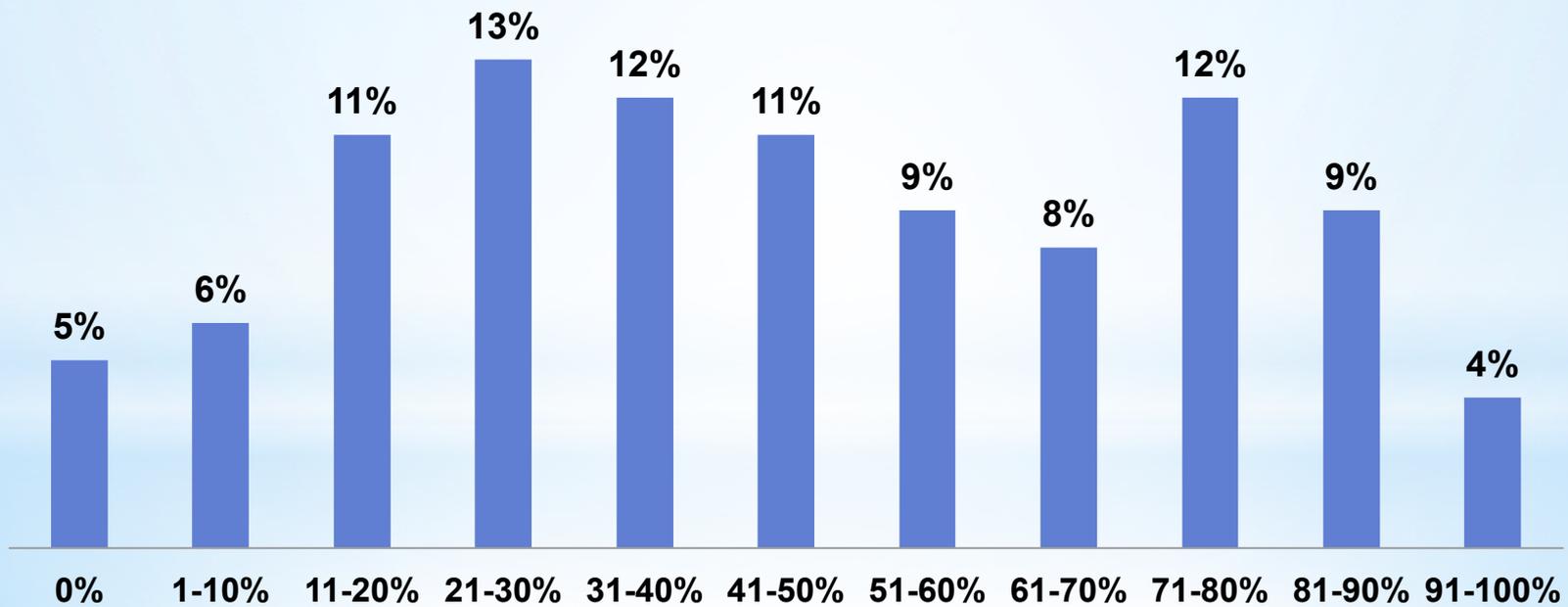
**In 2011, "Not enough value" was phrased "Fair value." Therefore, direct comparison with 2011 data is not possible.*

Mobile Use in Business

Mobile Use in Business

REALTORS® spend a median 44% of their time corresponding with and doing work for their clients on mobile devices. 42% spend more than half their work time on mobile devices. (This question was not asked in 2011.)

About what percentage of your time do you spend corresponding with and doing work for your clients on mobile devices?



Mobile Use in Business

The vast majority (94%) of REALTORS® communicate with clients using a mobile device. Over half take/post photos (60%) and read/consume news (59%). (This question was not asked in 2011.)

Which of the following activities do you engage in for work purposes using a mobile device?



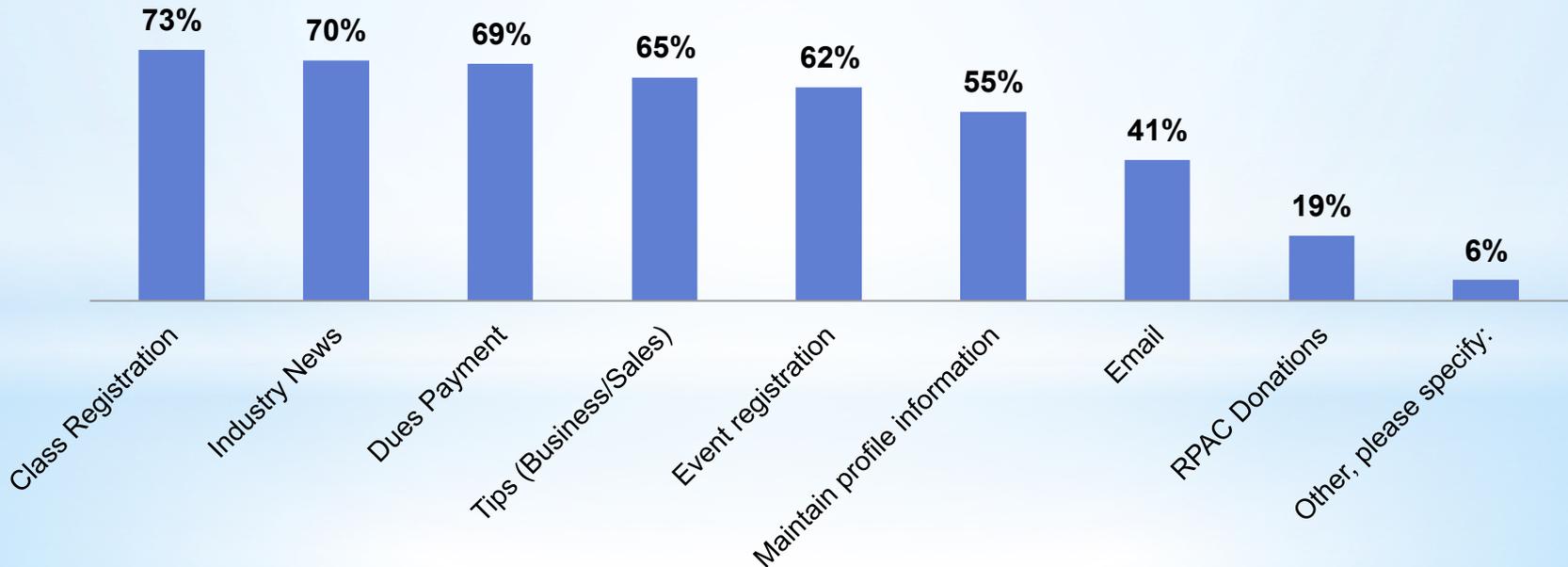
Technology and REALTOR® Associations

Technology and REALTOR® Associations – Most Important Functions to Offer Via Web

The three most important functions that REALTORS® feel REALTOR® associations can offer electronically via the web are:

- Class registration (73%);
- Industry news (70%);
- Dues payment (69%).

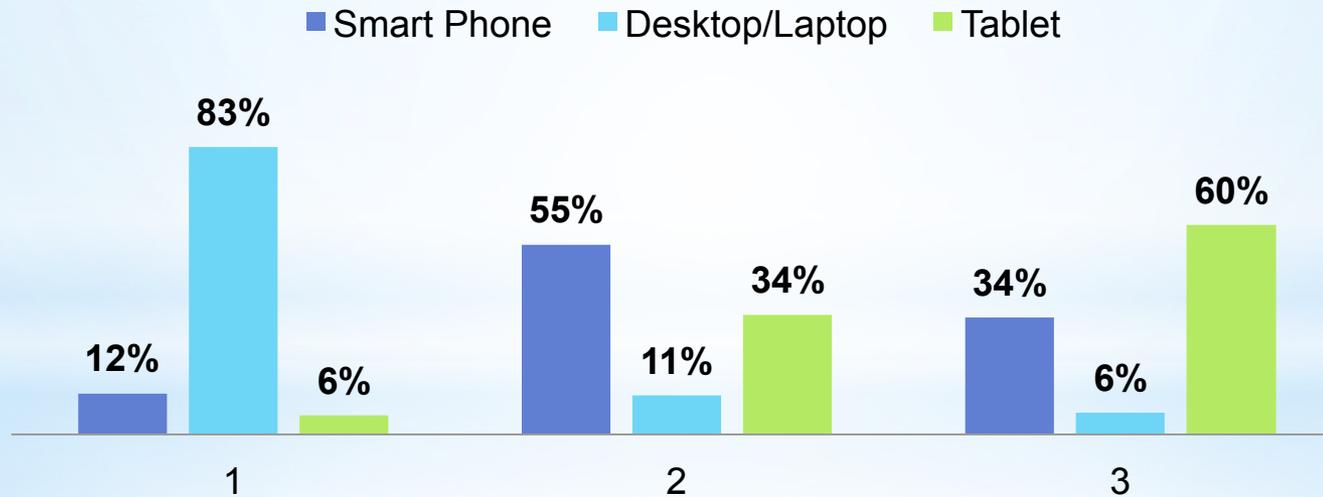
What are the most important functions that REALTOR® associations can offer electronically via the web?



Technology and REALTOR® Associations – Devices Used to Access Association Websites

REALTORS® use Desktops/Laptops most often (83% rank this #1) to access their local or state association websites. They cite smartphones second most often (55% rank #2) and tablets third (60% rank #3).

Below are some general device types you might use to access your local or state association's website. Please rank these from 1 to 3, where 1... used MOST often and 3...LEAST often



Social Media & Networking

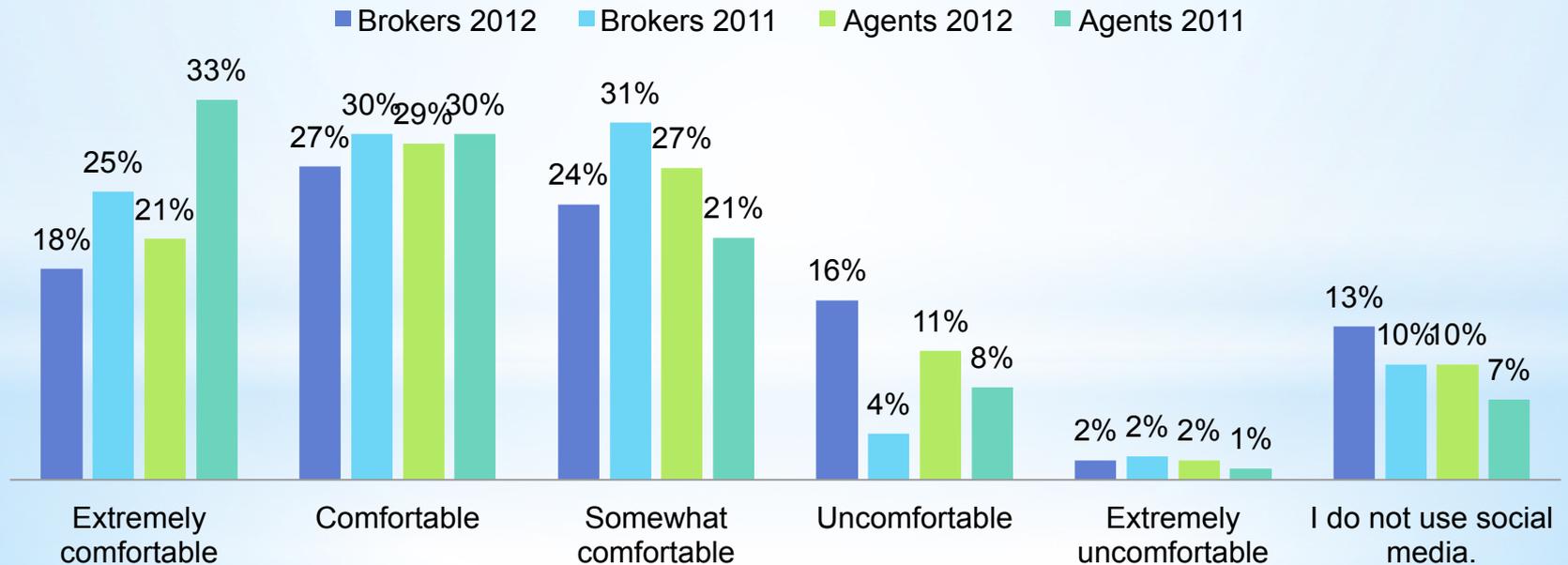
Social Media & Networking

89% of all REALTORS® use social media in some way, and 80% use it for their real estate business.

The average REALTOR® is comfortable using social media: 29% say they are comfortable with it and 20% say they are extremely comfortable. Only 11% of REALTORS® overall do not use it.

Brokers and Agents are equally as likely to be comfortable using social media, but the comfort level has decreased among both groups in the past two years. Brokers in particular appear to be less comfortable with social media than two years ago.

How comfortable are you using social media?

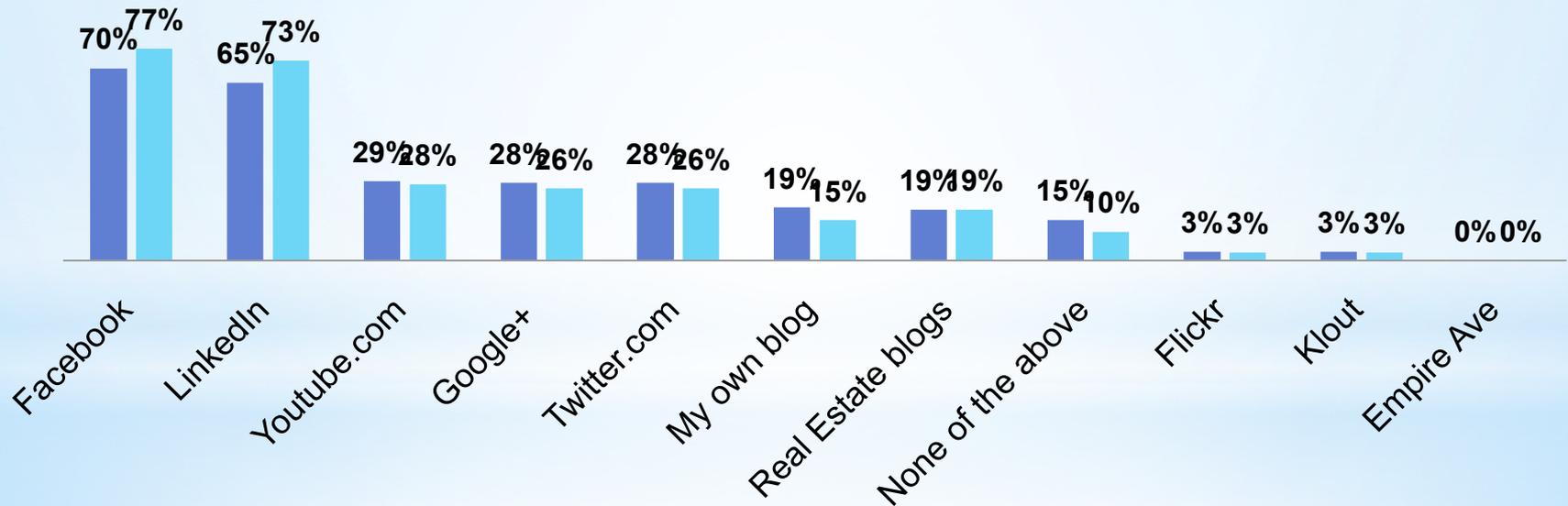


Social Media & Networking

Facebook and LinkedIn continue to be the social media tools that REALTORS® use most, although use of both has decreased somewhat since 2011. Brokers are slightly more likely than Agents to say they do not use any of these social media tools.

For real estate business purposes, which of the following do you participate in?

■ Brokers ■ Agents



Because "None of the above" was not included as an option in 2011, 2011 and 2012 results cannot be compared.

Social Media & Networking

The 20% of all REALTORS® who do not use social media for their real estate business were asked what their reasons were for this. The reasons cited most often were:

- Concern about security/don't trust it
- Too busy/don't have time
- Don't know how
- Don't see the value/ROI
- Prefer personal contact
- Not interested.

REALTORS® who do use social media in their businesses cite the following reasons for doing so most often :

- Visibility/Exposure/Marketing
- Free advertising
- Easy communication/allows them to stay in touch with multiple clients at once
- Clients expect it
- Building relationships/networking
- Promoting listings.

Lead Generation & Listings

Lead Generation & Listings

Referrals, repeat business and the Internet remain the top three most important methods of generating leads. Internet, however, is rated significantly less important than in 2011; 52% considered this “very important” in 2012, versus 61% in 2011.

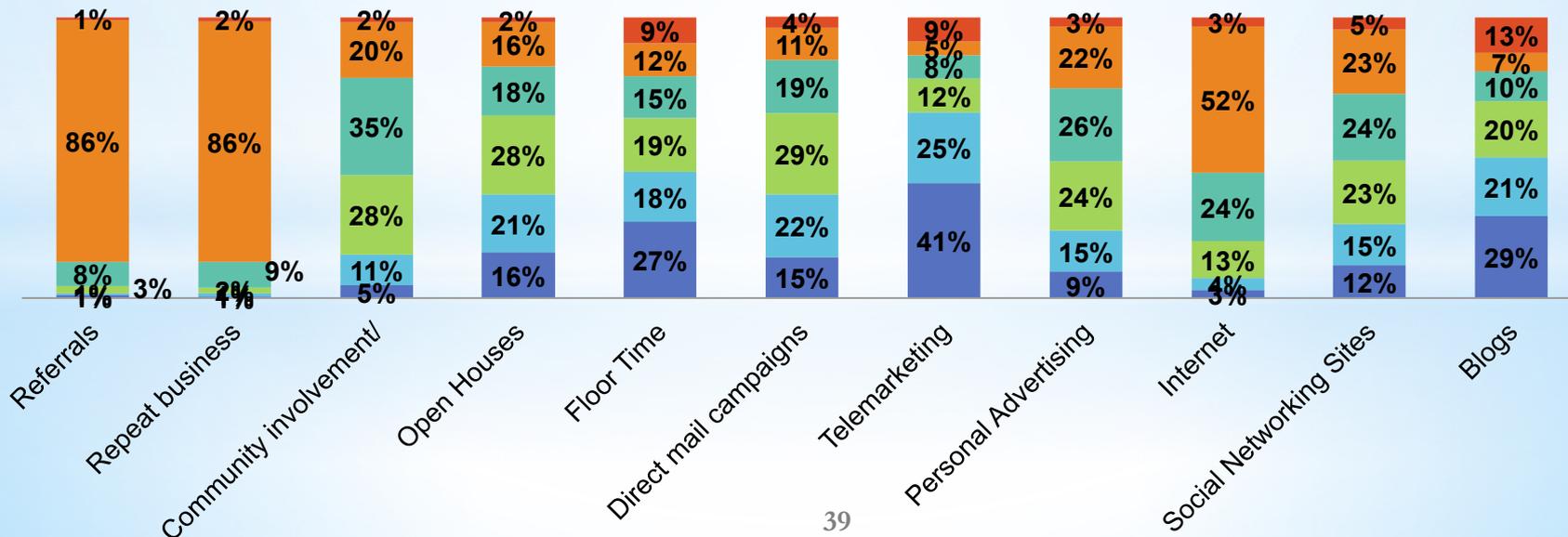
82% of agents and brokers are in charge of marketing their own listings.

81% pay for the marketing involved with their listings. This is a small but measurable increase from 2011 (75%).

How important are each of the following in generating your leads?

Asked of Agents & Broker Associates

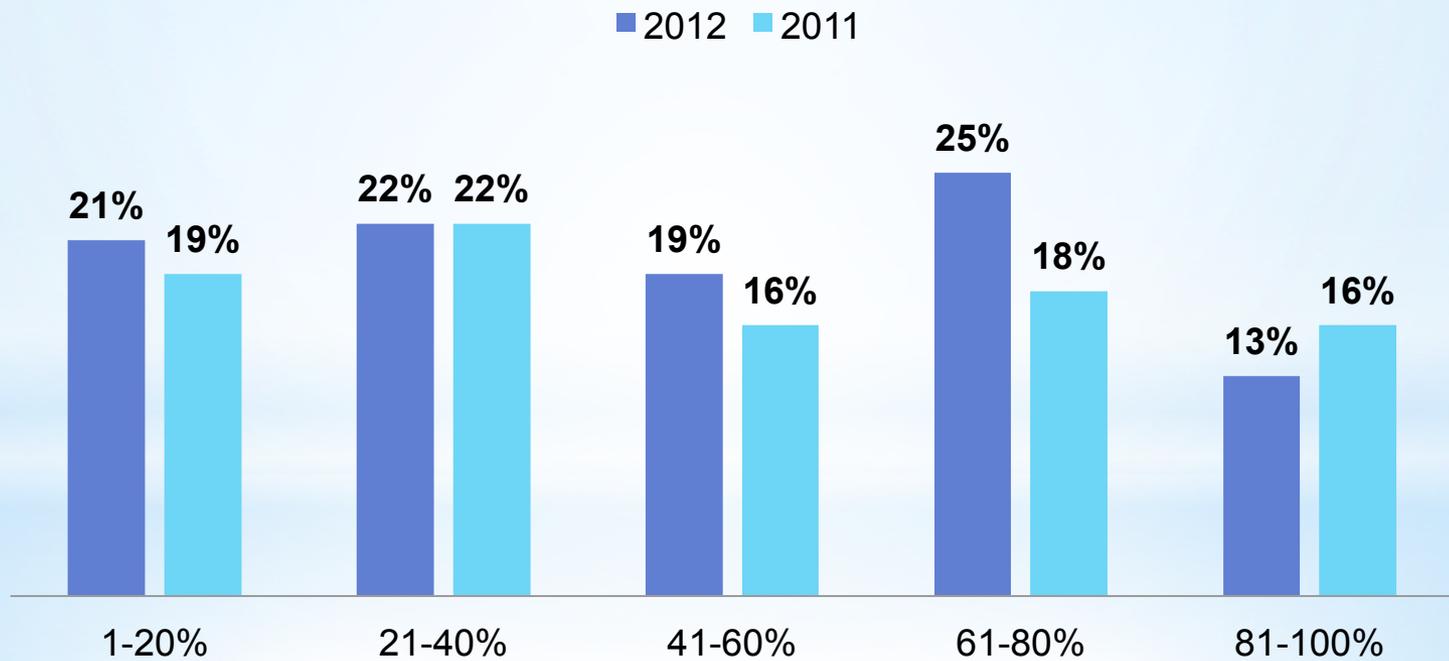
- 1 - Not at all important
- 2 - Not very important
- 3 - Somewhat important
- 4 - Important
- 5 - Very important
- Not applicable



Lead Generation & Listings

Agents and broker associates receive an average of 50% of their business from referral clients. The median is also 50%; this is essentially unchanged from 52% in 2011.

What percent of your business is from referral clients?



Lead Generation & Listings

Agents and Associate Brokers were asked what the single best marketing software is for generating new leads. Many of the responses were “don’t know/haven’t found one yet,” but the others mentioned most often were:

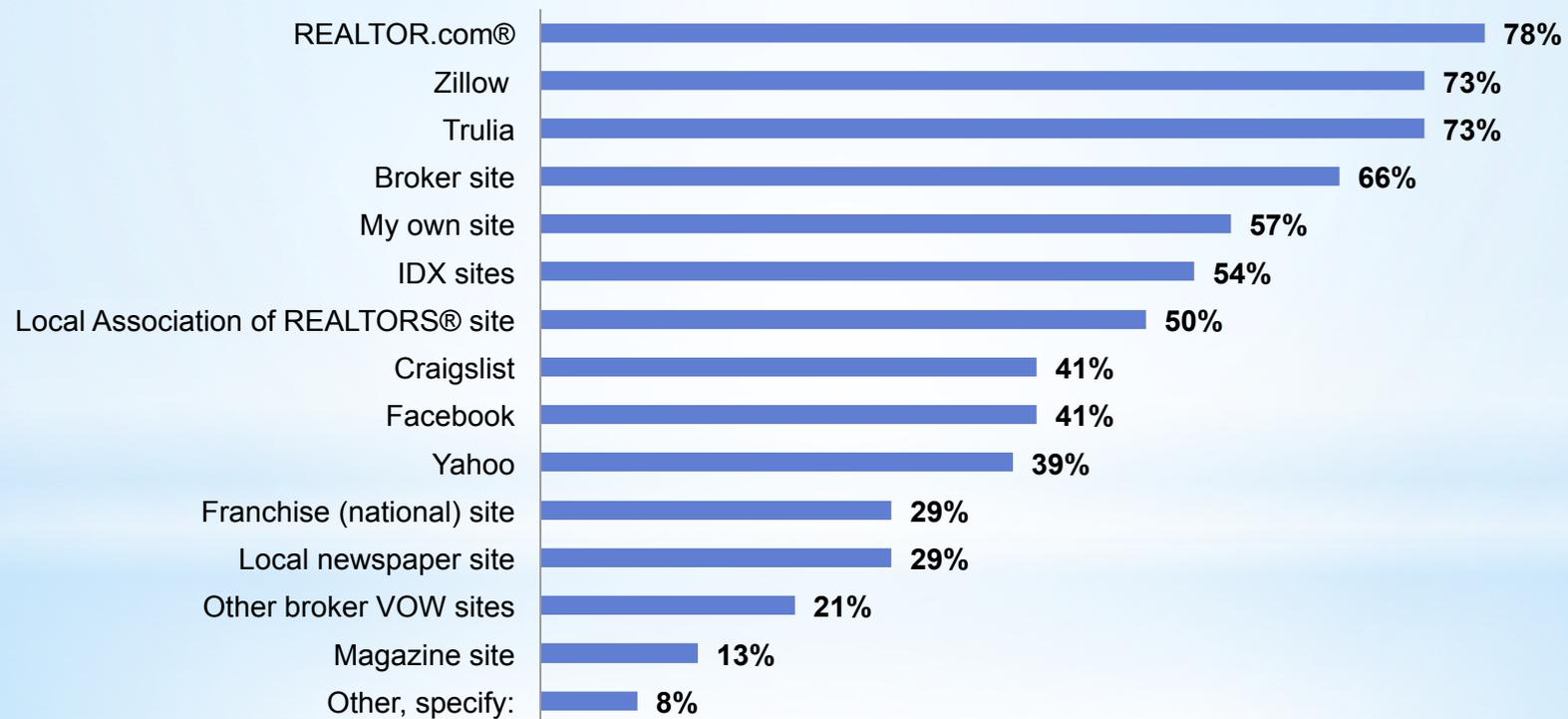
- Trulia
- Zillow
- Personal website
- REALTOR.com®
- Allpropertymanagement.com
- Boomtown
- Buffini’s CRM system
- Company website
- Constant Contact (e-marketing tool)
- Craigslist
- E-Edge
- Facebook
- Market Leader

Lead Generation & Listings

REALTOR.com®, Zillow and Trulia are the top three websites where agents and broker associates display their listings. Majorities also display their listings on their broker's site, their own websites, and on IDX sites.

What are the web sites where your listings are displayed?

Asked of Agents and Broker Associates Only*



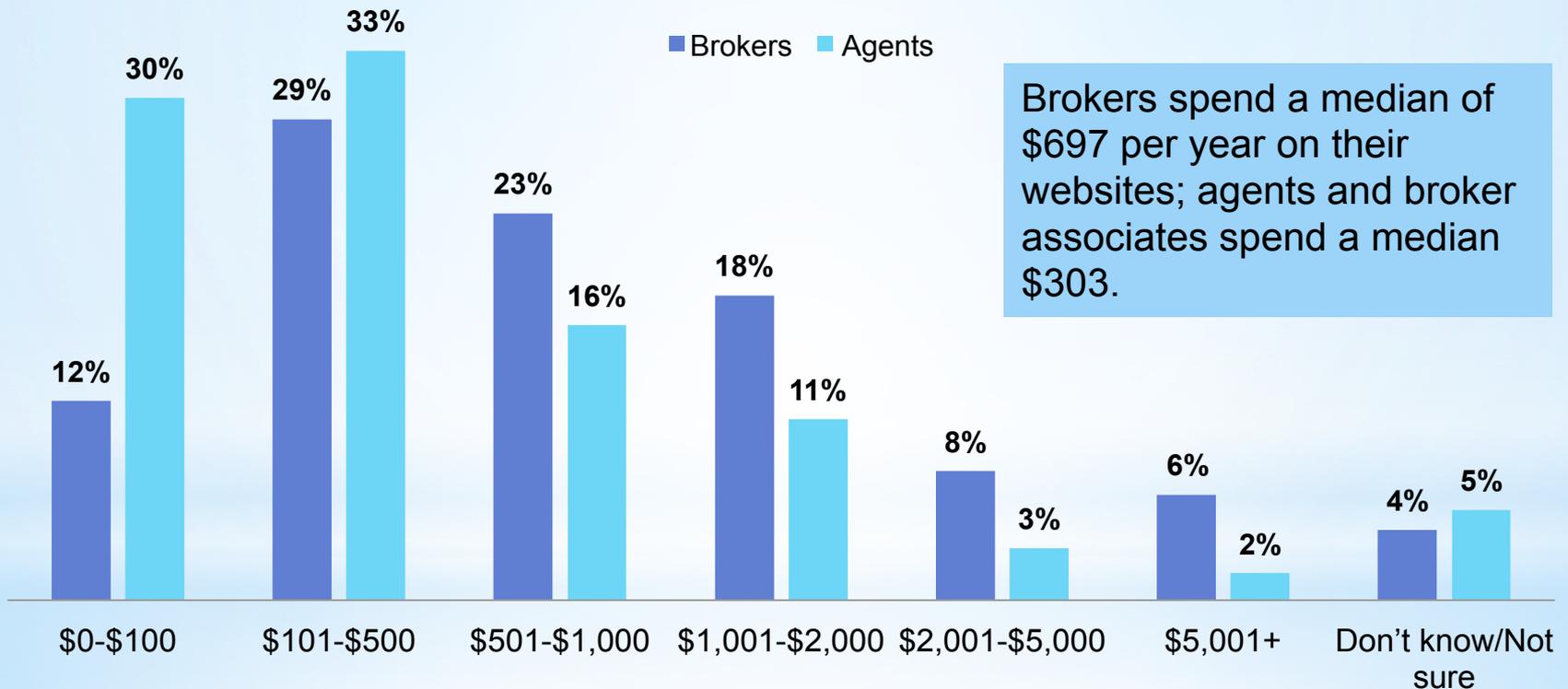
*This question was asked of all respondents (including Brokers) in 2011; therefore comparison with 2011 results is not possible.

Real Estate Websites

Real Estate Websites

72% of agents and broker associates have real estate agent websites. 79% of brokers and managers have company web sites.

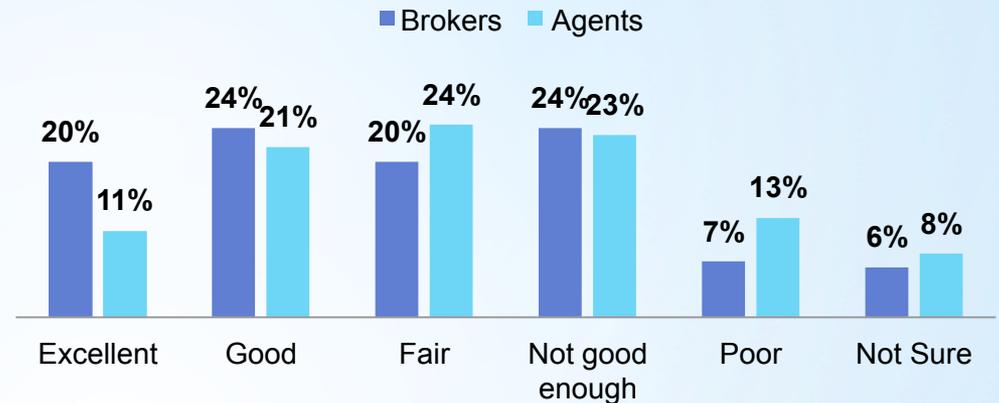
How much do you spend annually on your web site?



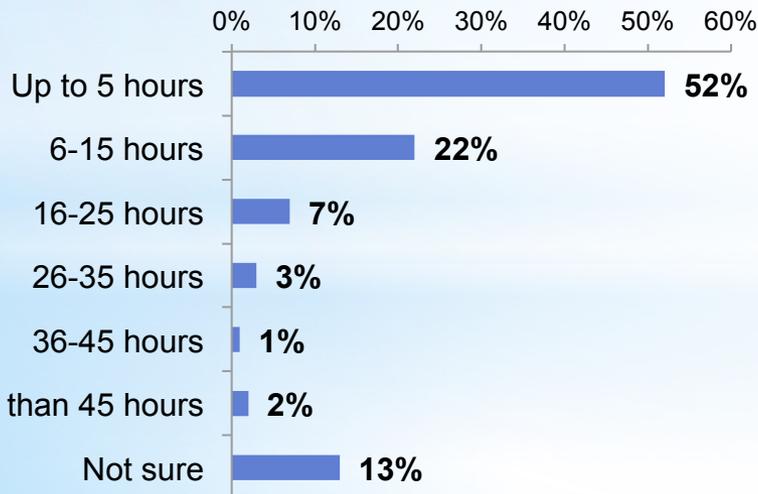
Real Estate Websites

Brokers rate the ROI of their websites significantly higher than agents and associate brokers.

In general, what kind of return on investment do you receive from your website?



How much time is invested on your website on a monthly basis?



52% of REALTORS® overall spend up to 5 hours per month on their websites, versus 48% in 2011. (There was no measurable difference between brokers and agents/associate brokers in terms of time spent.)

Real Estate Websites

While slightly fewer broker websites require consumers to register to access listing information than in 2011, more agent/broker associate websites require this.

Significantly more agents/broker associates say their sites have listing search capabilities than do brokers.

Satisfaction with the amount of web leads has held steady since 2011, and there are no significant differences between agents and brokers for this question.

About Your Website (Percentages are "yes" responses to each question)



CONTACT INFORMATION FOR THIS REPORT

NATIONAL ASSOCIATION OF REALTORS®

Marketing Research Department

430 North Michigan Avenue

Chicago, IL 60611

LISA HERCEG

Manager, Marketing Research

Marketing Research

312-329-8563

lherceg@realtors.org

MATT LOMBARDI

Vice President

Marketing, Promotions & Marketing Research

312-329-8521

mlombardi@realtors.org